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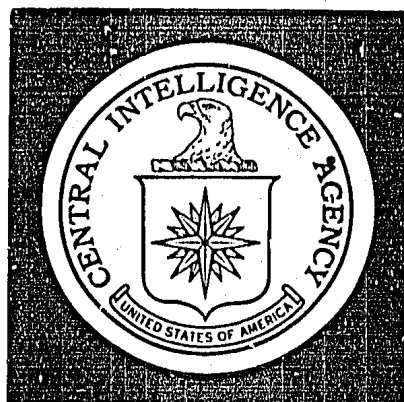


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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Shipping To North Vietnam During April 1970

~~Secret~~

ER IM 70-72
May 1970

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Foreword

All data are preliminary and subject to minor changes as additional information becomes available. [REDACTED]

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Data for the preceding month and monthly averages presented in the tables have been adjusted to reflect corrections and additions. Weights of cargoes are expressed in metric tons. Because of rounding, components may not add to the totals shown.

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CENTRAL INTELLIGENCE AGENCY
Directorate of Intelligence
May 1970

INTELLIGENCE MEMORANDUM

Shipping To North Vietnam During April 1970Highlights

North Vietnamese seaborne imports in April fell by nearly 11% to 151,000 tons. Reduced deliveries from the USSR were partly offset by a sharp increase in deliveries from Communist China. Food-stuff imports rose for the third consecutive month because of increased deliveries of rice, corn, and soybeans from China. Petroleum imports, nearly all from Soviet Pacific ports, dropped to 18,500 tons, their lowest level in 20 months. Fertilizer imports also were down because of falling deliveries from the USSR and North Korea. Two small consignments of probable military-related cargo arrived on Soviet vessels from Black Sea ports. Shipments from the Free World were the lowest since December 1968, and no imports arrived from Japan.

Seaborne exports in April rose 53% to 42,000 tons. Coal exports increased to 27,300 tons with the renewal of shipments to China and the first shipment to Cuba in 11 months. Exports of rice were at their highest level in 1970, exports of apatite increased slightly, and cement exports were negligible. [redacted] new berths being added to the Chamber of Commerce Wharves in Haiphong will extend farther up river than previously estimated resulting in a larger net addition to port capacity. New pipeline and storage facilities have been observed west of Hon Gai, possibly to handle petroleum lightered from tankers in adjacent Halong Bay.

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Note: This memorandum was produced solely by CIA. It was prepared by the Office of Economic Research and information on ship arrivals was coordinated with the Naval Intelligence Command.

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Foodstuffs

1. Imports of foodstuffs rose in April for the third consecutive month to 77,700 tons (see Tables 1 and 2). Deliveries from the USSR, mostly wheat flour out of the Soviet Far East, dropped to 42,700 tons, about 22% less than in March. Deliveries from Communist China, mostly corn and rice, jumped to 35,000 tons, more than three times the volume in March, as shown in the following tabulation:

Metric Tons					
	<u>Total</u>	<u>Corn</u>	<u>Rice</u>	<u>Soy-</u> <u>beans</u>	<u>Other</u>
1969 (monthly average)	31,400	12,700	14,200	1,000	3,500
1970					
Jan	6,000	--	4,000	--	2,000
Feb	8,700	--	5,700	3,000	--
Mar	10,600	8,100	2,500	--	--
Apr	35,000	17,200	15,600	2,200	--

2. Rice shipments from China were the highest in 11 months and well above the 4,100-ton monthly average during the first quarter; corn shipments from North China increased sharply to their highest level since June 1969. Despite the increase, however, foodstuff deliveries from China were still below the 41,600-ton average for the first four months of 1969.

Petroleum

3. Imports of petroleum fell abruptly in April to 18,500 tons, the lowest level since August 1968. Cumulative petroleum deliveries in the first four months of 1970, however, were 11% higher than in the corresponding period of 1969. All of the volume in April originated in the Soviet Far East except for 1,500 tons from China. Although Soviet

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tankers in the North Vietnamese trade usually come from Soviet Pacific ports, five were en route from the Black Sea and one from the Baltic Sea in April. Three of these, small tankers with a total of 8,000 tons of petroleum aboard, are expected at Haiphong in May. The others, larger tankers with almost 40,000 tons of petroleum aboard, are due in June and could boost petroleum imports in that month to record levels. Four of these tankers are newly built ships being delivered to the Far East Steamship Company in Vladivostok and an unidentified Pacific operating base of the fishing fleet. The others will likely be used to deliver petroleum from the Soviet Far East to points along the Northern Sea Route, a routine practice during the summer months.

Other Imports

4. Imports of fertilizer fell to 12,800 tons, below the monthly average in the first quarter. Imports of general and miscellaneous cargo, down slightly from March, included machinery, construction equipment, medicines and medical equipment, cable, pyrites, vehicles, and barges. About 35 tons of probable military-related cargo was delivered in April by two Soviet ships, the *Komsomolskaya Slava* and the *Berezniki*.

Truck Deliveries

5. Truck deliveries have been low since January, the latest month in which a Soviet ship with a full load of vehicles arrived from the Soviet Far East. Deliveries in April were only one-fifth the average monthly level in 1969, as shown in the following tabulation:

	<u>Number of Trucks</u>
1969 (monthly average)	375
1970	
Jan	543
Feb	52
Mar	38
Apr	73

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However, truck deliveries should increase in May. A large Soviet freighter, believed to be carrying trucks, left Nakhodka for North Vietnam on 26 April.

Exports

6. Seaborne exports in April increased by almost 15,000 tons to 42,000 tons, but were 16% lower than the monthly average in the first quarter (see Tables 3 and 4). Shipments to Communist China, which were absent in March, amounted to 10,300 tons. Coal exports rose to 27,300 tons, largely because of a small increase in shipments to Japan, the resumption of coal exports to China, and the first shipment to Cuba since May 1969. All of the coal to Japan was carried on Soviet vessels. The single shipment of coal to China, the first since February, totaled 4,300 tons, far below the volumes shipped to China in January and February. Exports of apatite were close to the monthly average in the first quarter and included 6,000 tons for China, the first to go there since shipments were resumed in 1969. Exports of rice in April -- to Singapore, Malaysia, and Hong Kong -- climbed to 2,500 tons. A small amount of cement (400 tons) was shipped to Hong Kong on North Vietnamese ships.

Joint Japanese-North Vietnamese Shipping Firm
Contemplated

7. The North Vietnamese Chamber of Commerce and certain Japanese firms formerly active in the North Vietnam trade have reportedly agreed to establish a joint maritime transport company to expedite trade between the two countries. Negotiations on the implementation of this agreement are to be conducted under the auspices of the Japan-North Vietnam Trade Association, whose Japanese members include the Godo Coal Company,* the Meiwa Industry Company, the Shinetsu Trading Company, and others.

8. Japanese trade with North Vietnam on Japanese vessels, which had reached substantial proportions before intensification of the war,**

* This firm has been the main Japanese purchaser of North Vietnamese anthracite coal.

** An average of 12 Japanese ships a month called at North Vietnamese ports during the first quarter of 1965.

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terminated abruptly in March 1965 when the Japanese Seamen's Union and the Japanese Shipowners' Association withdrew all Japanese ships from the North Vietnamese trade. From that time until May 1968 all North Vietnamese-Japanese trade moved on non-Japanese Free World and Communist vessels. Since then four Japanese ships have called in North Vietnam, but their voyages were apparently unprofitable.

Port Activity

9. Forty-two ships arrived in April, the same number as in March (see Table 5). There was, however, considerable realignment in the flag composition. Soviet arrivals fell to 20, seven below the record level in March, while Free World arrivals rose from four to nine* and Chinese arrivals increased from four to eight. Two Somali-flag vessels arrived in April and three apparently will call in May. For the sixth consecutive month there were no Cypriot-flag arrivals. A Cypriot-flag ship, however, passed the Bosphorus on 18 April en route from Constanta to Haiphong.**

10. As in the past, most of the ships (36) arrived at Haiphong. Two ships arrived in Cam Pha, both to load coal. Four ships called at Hon Gai: two with foodstuffs, one with bituminous coal from China, and one to load hard coal. Congestion at Haiphong was a problem during the first week of April, but it was either slight or nonexistent thereafter. The average number of dry cargo ships in port per day was 15, the same as in March. The average layover time for departing dry cargo ships fell from 17 to 14 days (see Tables 6 and 7).

Construction of Wharf and Petroleum Facilities

11. Construction continued at one end of the extended Chamber of Commerce Wharves. The eastern end of the Hospital Wharf, which until recently provided a berth for small merchant ships, is

* All of the Free World ships arrived from North China.

** The US Government has repeatedly encouraged both the Somali and Cypriot governments to keep their ships out of the North Vietnamese trade.

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apparently being dismantled, possibly to make way for further extension of the new wharves [redacted]

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[redacted] Withdrawal of the Hospital Wharf from service will increase the short-run potential for congestion at Haiphong. If the new construction does displace this old wharf, it will probably enable North Vietnam to dock larger vessels there. A third portal crane has been erected on the new wharf extension but is not yet in operation. A fourth lies unassembled nearby.

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Petroleum Storage and Pipeline Construction Near Halong Bay

12. [redacted] the North Vietnamese have been building a pipeline and petroleum storage facilities north of Halong Bay and west of the coal port of Hon Gai. The pipeline begins at a point on the shore across the Cua Luc Channel from Hon Gai and extends westward through the new storage facilities that are located among hills inland from the channel.* The capacity of these facilities is currently estimated to be from 2,500 to 5,000 tons. The storage facilities may be intended to hold some of the petroleum that tankers of over 5,000 deadweight tons must discharge into lighters in Halong Bay before transiting the shallow approaches to Haiphong's Bach Dang petroleum anchorage.

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* The western terminus of this pipeline has not been determined and it is not known whether additional storage facilities exist farther along the line.

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Table 1
Seaborne Imports, by Origin and Commodity
1970

Thousand Metric Tons										
Origin	Foodstuffs		Fertilizer		Petroleum		General and Miscellaneous		Total	
	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar
<i>Total</i>	<i>77.7</i>	<i>57.8</i>	<i>12.8</i>	<i>15.3</i>	<i>18.5</i>	<i>34.7</i>	<i>42.4</i>	<i>55.2</i>	<i>151.3</i>	<i>163.0</i>
Communist	77.7	57.8	12.8	12.5	18.5	34.7	41.8	50.6	150.7	155.6
USSR	42.7	46.6	9.3	9.6	16.9	34.2	18.7	23.8	87.7	114.3
Eastern Europe	Negl.	0.1	2.9	0.5	-	-	3.7	10.3	6.7	10.9
China	35.0	8.4	-	-	1.5	0.5	16.6	16.3	53.1	25.2
North Korea	-	-	0.5	2.3	-	-	2.8	0.1	3.4	2.4
Cuba	-	2.7	-	-	-	-	-	Negl.	-	2.7
Free World	0	0	0	2.8	0	0	0.6	4.6	0.6	7.5
Japan	-	-	-	8	-	-	-	0.2	-	3.1
Cambodia	-	-	-	-	-	-	-	4.0	-	4.0
Other	-	-	-	-	-	-	0.6	0.4	0.6	0.4

Table 2
Seaborne Imports, by Flag and Commodity a/
1970

Thousand Metric Tons							
Flag	April				Total	March	Monthly Average Jan-Mar
	Food- stuffs	Ferti- lizer	Petro- leum	General and Miscel- laneous ^{b/}			
Total	77.7	12.8	18.5	42.4	151.3	169.4	163.0
Communist	53.3	12.8	16.9	32.8	115.8	150.8	144.2
Soviet	42.7	9.9	16.9	21.5	91.0	131.1	117.8
East European	Negl.	2.9	-	4.3	7.2	8.2	10.4
Chinese	10.5	-	-	7.0	17.5	11.5	12.2
Cuban	-	-	-	-	-	-	2.7
North Vietnamese	-	-	-	0.1	0.1	Negl.	1.0
Free World	24.4	0	1.5	9.6	35.5	18.6	18.8

a. Identified imports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

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Table 3

Seaborne Exports, by Destination and Commodity
1970

Thousand Metric Tons

Destination	Coal		Cement		Apatite		Rice		General and Miscel-laneous		Total	
	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar	Apr	Monthly Average Jan-Mar
<i>Total</i>	27.3	33.1	0.4	1.7	8.5	8.7	2.5	1.2	3.5	5.7	42.2	50.4
Communist	9.3	15.3	0	0	8.5	8.7	0	0	0.9	3.0	18.6	27.0
USSR	-	-	-	-	-	-	-	-	-	1.5	-	1.5
Eastern Europe	-	-	-	-	-	-	-	-	0.3	1.2	0.3	1.2
China	4.3	15.3	-	-	6.0	-	-	-	-	0.2	10.3	15.5
North Korea	-	-	-	-	2.5	8.7	-	-	-	0.1	2.5	8.8
Cuba	5.0	-	-	-	-	-	-	-	0.5	-	5.5	-
Free World	18.1	17.8	0.4	1.7	0	Negl.	2.5	1.2	2.7	2.7	23.7	23.3
Japan	17.1	16.1	-	-	-	Negl.	-	-	0.9	0.4	18.0	16.5
Cambodia	-	-	-	-	-	-	-	-	-	0.7	-	0.7
Other	1.0	1.7	0.4	1.7	-	-	2.5	1.2	1.8	1.6	5.7	6.2

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Table 4
Seaborne Exports, by Flag and Commodity a/
1970

Thousand Metric Tons								
Flag	April					Total	March	Monthly Average Jan-Mar
	Coal	Cement	Apatite	Rice	General and Miscel- laneous			
<i>Total</i>	27.3	0.4	8.5	2.5	3.5	42.2	27.6	50.4
Communist	27.3	0.4	6.5	2.5	3.5	40.2	27.6	49.7
Soviet	17.1	-	-	1.0	1.2	19.3	23.1	26.6
East European	-	-	2.5	1.5	0.3	4.3	3.0	1.9
Chinese	4.3	-	4.0	-	-	8.3	-	16.2
Cuban	5.0	-	-	-	0.5	5.5	-	1.7
North Vietnamese	1.0	0.4	-	Negl.	1.5	2.9	1.5	3.3
Free World	<u>0</u>	<u>0</u>	<u>2.0</u>	<u>0</u>	<u>0</u>	<u>2.0</u>	<u>Negl.</u>	<u>0.7</u>

a. Identified exports include some estimates of bulk cargoes, using methods which have proved to be highly reliable.

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Table 5
Ship Arrivals, by Type, Flag, and Origin
1970

	April							
	Origins							
	USSR							
Type/Flag	Black Sea	Far East	Communist China	Other Communist	Free World	Total	March Total	Monthly Average Jan-Mar
Total	5	13	17	2	5	42	42	43.7
Dry cargo	5	9	17	2	5	38	35	38.0
Tanker	-	4	-	-	-	4	7	5.7
Communist	5	13	8	2	5	33	38	39.0
Soviet	5	13	-	1	1	20	27	25.7
East European	-	-	-	1	-	1	2	3.0
Bulgarian	-	-	-	-	-	-	-	0.7
Polish	-	-	-	1	-	1	2	2.3
Chinese	-	-	8	-	-	8	4	5.3
Cuban	-	-	-	-	-	-	1	1.0
North Vietnamese	-	-	-	-	4	4	4	4.0
Free World	0	0	9	0	0	9	4	4.7
British	-	-	7	-	-	7	3	3.3
Somalian	-	-	2	-	-	2	1	1.0
Other	-	-	-	-	-	-	-	0.3 a/

a. Maltese.

Table 6

Average Number of Dry Cargo Ships in Haiphong per Day

Month	Number of Ships			
	1967	1968	1969	1970
January	7	21	24	14
February	10	23	21	17
March	16	23	21	15
April	16	19	21	15
May	18	16	20	
June	25	23	18	
July	22	30	21	
August	17	28	17	
September	13	34	17	
October	13	33	15	
November	12	29	11	
December	13	27	13	
<i>Average for year</i>	<i>15</i>	<i>25</i>	<i>18</i>	

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Table 7
Average Layover Times
for Foreign Dry Cargo Ships Departing Haiphong a/

Month	Number of Days			
	1967	1968	1969	1970
January	12	15	25	13
February	10	27	21	14
March	13	28	17	17
April	12	19	19	14
May	17	14	20	
June	22	17	21	
July	24	25	21	
August	33	31	22	
September	19	41	21	
October	19	35	19	
November	18	30	16	
December	15	29	14	
Average for year	18	25	20	

a. The average layover time for departing dry cargo ships is compiled by averaging layover times (including both the day of arrival and the day of departure) of all foreign dry cargo ships leaving Haiphong in the month. Tankers are excluded from the average because they do not compete with dry cargo ships for the limited berthing space in Haiphong.

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